

DOE ARRA Amended Local Plan – Cover Page

Due Date October 30, 2009

Email To localplan@csd.ca.gov

Contact for Questions

Agency Name	Metropolitan Area Advisory Committee
Contact Person	Patricia Bailey
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Participation Acceptance

Our agency is interested in participating in the DOE ARRA Program. We certify that we have the capacity to provide the required services within our service territory as outlined in the Local Plan.

Signature	
Name	Austin Foye
Title	Chief Financial Officer
Phone Number	(619) 426-3595
Email	afoye@maacproject.org
Date	10/31/2009

CSD Approval

Approved by

Approval Date

DOE ARRA Amended Local Plan

Instructions

It is important to first read the DOE ARRA Local Plan Instructions provided as a separate document before completing this plan.

General Plan

Describe your current progress towards your local plan goals and ramp-up to increase capacity and outreach in anticipation of receiving the DOE ARRA Production contract.

We have hired our ARRA Assessor and he has completed all of the required trainings on line and in the training centers. Assessments are currently being conducted as a ramp up for the commencement of the ARRA Contract. Our ARRA Program Manager has also completed all of the required trainings. 95% percent of our ARRA Weatherization Specialists have completed and passed the Basic Weatherization, Combustion Appliance Safety, Duct Blaster and online trainings/certifications.

On October 28th, South Bay Window & Glass Company provided training on how to cut glass and install window assemblies to all of the ARRA workers.

On November 9th and 10th, 2009 our ARRA Program Manager and Assessor will be attending an Inspector Training Class conducted by Richard Heath & Assoc. as per the DOE ARRA Contract Requirements.

We have purchased our ARRA Weatherization Staff tools. The ARRA WX Specialists have been out weatherizing homes with our existing LIHEAP crews, therefore, receiving hands on training.

Our weekly ARRA time sheets, sign in sheets and weekly payroll have been finalized and will be effective as of November 1, 2009.

We are in the process of finalizing the selection of our ARRA HVAC Contractor.

Our ARRA Vehicle Lease Contractor has been selected and the paperwork of our proposed 6 vehicles is being finalized.

On October 12, 2009, Crysta Meadows from the San Diego & Imperial County Labor Council gave a presentation to all ARRA staff on how to apply to become a Union member via their apprenticeships. This information we provided to our staff as an incentive of a career path to a more prosperous future.

We are currently working with our local college, Southwestern College, on a date to have all of our ARRA workers attend a CPR/First Aide Class as part of a Safety Net to the them.

In reviewing the amount of your allocation, will you be able to build capacity enough to accept and spend the total amount for your entire service area?

Yes

If not, what % of the allocation can you accept?

For multi-county agencies, will you have the capacity to spend

funds proportionate to each county's allocation and meet the 50% threshold in each county by the required deadline?

**Outreach to
Potential
Clients**

Describe how you will increase your outreach efforts to reach the necessary number of low-income clients needed to meet your ARRA production goals. If you are a multi-county agency, describe how this will be accomplished in each county.

We are currently informing our LIHEAP energy assistance clients of the availability of ARRA Weatherization Funds for the weatherization of their homes. All of those households who are currently being assisted with energy payments qualify and should receive the ARRA Weatherization funds.

Fliers are currently being distributed throughout the community at our local libraries, Dept. of Health & Human Services, Social Security Administration and the Employment Development Department Offices to inform them of the availability of ARRA Weatherization services.

Once our contract is executed we will contact our local media and do a news cast to promote the ARRA Program.

Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, potential partners, marketing plans, etc...

Immediate

Finalize HVAC Contracting
Conclude Leased Vehicle Contract and Acquire Vehicles
Continue the hands on training of the ARRA staff with our LIHEAP workers performing weatherization measures on our LIHEAP Contract.
Ensure the last new hire finalizes all of the required trainings. (5% needed)

Potential Partners

South County Career Center
Local Initiatives Support Corporation
IBEW 569 Electrical Union
San Diego & Imperial County Labor Council

Marketing Plans

We are going to proceed with the plans mentioned above for the outreach/marketing efforts on the ARRA Weatherization Program.

Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants:

Our weekly payroll, weekly time sheets and sign in sheets came into effect November 1, 2009.

As of October 30, 2009 our ARRA Program Manager, 6 Weatherization Specialists and the Assessor completed all of the required trainings online and in the training facilities.

On November 6, 2009 our HVAC Contractor will be notified of their selection and will be contracted.

On November 4, 2009 a selected Company was identified as our Lease Agency for the ARRA vehicles.

**Outreach to
Elected
Officials**

Describe how you will increase your outreach efforts to educate, and possibly partner with, your local elected officials. If you are a multi-county agency, describe how this will be accomplished in each county.

Once our ARRA contract is executed, we will be contacting the Mayors of the City of Chula Vista, San Ysidro, City of National City, El Cajon, Assembly Member Mary Salas and Congressman Bob Filner, all of whom are very supportive of MAAC Project and our services to the community, and informing them of the ARRA dollars available to weatherize the low to medium households in their respective areas.

Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, contact people, etc...

We will be notifying the elected officials mentioned above, via letter or email, as soon as our ARRA Contract is executed.

Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.

Once our ARRA Contract is executed we will inform our above mentioned elected officials of the details of the program and any support we may need from them to ensure the success of the program.

**Outreach to
Potential
Partners and
Community**

Describe how you will increase your outreach efforts to educate and inform the community at large and create an environment that fosters partnerships in your local community. If you are a multi-county agency, describe how this will be accomplished in each county.

MAAC Project is a well established non-profit agency who works many programs and partnerships in the San Diego County.

As mentioned previously, we are currently working with San Diego & Imperial County Labor Council and our local unions in turning our ARRA Weatherization Program into a career path for the unemployed. We intend to give them working skills and guide them into apprenticeship position that will eventually allow them to become journeyman in the union fields. We intend to accomplish this by networking with the previously mentioned partnerships.

Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, contact people, etc...

We collaborate very closely with our partners in employing the local low income community. Our ARRA Program provides a 6 month on the job training, job skills and certifications acquired settings, and then a hands on lead into the apprenticeships of the unions.

Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.

**Quality
Assurance**

For each question in this section, provide a comprehensive narrative on your current processes and what changes you will make to increase the oversight of program staff and subcontractors to ensure that:

Only eligible households are served and that priority will be given to vulnerable populations and those with high energy burden per DOE regulations.

Our Weatherization Assessor conducts an initial assessment which ensures that all program eligibility requirements are met. At this time, those households with the highest energy burden and/or families with disabled, elderly and young children under the age of 5 will be given first priority in the weatherization services we provide.

Applying this process ensures that we serve the eligible targeted low income households the ARRA Program is intended for.

Only feasible measures are installed; all measures billed to CSD were installed, and workmanship meets CSD standards.

After work is completed on each unit our Weatherization Supervisor will conduct a final inspection to ensure all work being billed was installed properly. We also request each household to complete a satisfaction survey which assists to make sure that our quality stays at a high standard.

All records meet CSD standards, billing is accurate and truthful, and reports are submitted on time.

At the time of a home assessment our Assessor will ask for the client's utility bill and proof of income for the prior month. Once eligibility has been determined, the home is assessed. All files are brought to the Weatherization Scheduler, checked for quality assurance, entered into the serv traq system, prioritized, then those households with the highest priority points are scheduled for the first weatherization appointment available. After the work is completed our Program Manager will conduct a final inspection to ensure that all billing is truthful and accurate. The Operations Program Manager will then conduct a timely report on all homes completed for the month.

Describe in detail the applicable Action Items that will need to be addressed in order to achieve compliance in the above three areas. Specify how these action items will be achieved through the concepts of who is responsible, how and when the actions will occur, and why the action is important.

The same flow chart will in place as to the responsibilities of each of the employees involved with our existing weatherization programs. We have had very successful weatherization programs for over 30 years.

**Workforce
Development**

Enter the total number of in-house employees currently working in CSD weatherization and HCS programs in the following positions. Count each employee only once. If only a portion of an employee's time is charged to the program, count that person as one.

Position	Total
Admin / Fiscal	13
Program Management	7
Program Support	19
Intake	1
Outreach	1
Other -	

Enter the total number of subcontracted employees currently working in CSD weatherization and HCS programs in the following positions. Count each subcontracted employee only once. If only a portion of an employee's time is charged to the program, count that person as one.

Position	Total
Admin / Fiscal	0
Program Management	0
Program Support	22
Intake	0
Outreach	0
Other -	0

Describe your plans for building up your in-house workforce to meet the capacity needed to perform the ARRA program.

Our existing workforce has the experience and capacity to incorporate the ARRA Weatherization Program into their daily work flow. As a matter of fact, all of the ARRA workers are currently receiving hands on training with our LIHEAP workers and they are weatherizing the LIHEAP homes. Once our ARRA contract is executed then they will be ready to perform the weatherization services on their own. The existing administration staff will guide and serve as back up to all of the new staff hired for ARRA.

Describe how you will develop partnerships with local workforce investment advocates in order to achieve the objectives outlined above.

Our collaborative efforts have been mentioned above.

Provide a timeline that corresponds to the above workforce development plan.

Our workforce development plans have been explained above and it has been mentioned that we intend to use our ARRA Weatherization Program as an on the job training/career path program.

Describe your plans for building up your workforce by outsourcing to meet the capacity needed to perform the ARRA program.

Our workforce collaborative is in place. We have our community based organizations, local unions and the low income community that we currently serve.

Describe your action plan for outsourcing, including a description of the RFP/bidding process, how interested parties will be informed of this opportunity, and provide a timeline for aligning subcontractors to provide timely delivery of services. Also describe your action plan for oversight of subcontractors. MAAC Project will conduct all of its weatherization work except for the HVAC factor.

At the current time, all HVAC RFP's have been reviewed and we are in the final selection process. We intend to select the HVAC provider who has the most experience with working with the Davis Bacon requirement.

If you are not outsourcing any of your workforces, explain why.

N/A

**Other
Subcontracting**

Describe your plans for procuring of material goods and services from third parties, how the agency plans to inform interested parties within the local community of subcontracting opportunities, and your action plan for oversight of subcontractors.

MAAC Project will use our existing providers that we currently use for our LIHEAP & DOE weatherization contracts.

Our inventory control employee goes out to shop comparison to ensure that we are getting the best pricing on our materials.

**Vehicle &
Equipment over
\$5,000 per Unit**

If you are planning on charging any portion of vehicle and equipment purchases to ARRA, enter the following information related to these purchases. This will require DOE approval.

Item	Quantity	Est. Cost
Vehicles	6	186,000

Identify any barriers that you feel you may face in meeting the requirements of ARRA (subcontracting, workforce development, outreach & marketing, quality assurance and oversight, compliance with DOE requirements, fiscal requirements and reporting, performance).

Another huge barrier is the inability to pay our hired ARRA staff with this contract and having to pay them and carry them after being trained under our regular LIHEAP Contract is a burden. The delay is making us consume of LIHEAP dollars forcefully because at this time we do not have a choice and we cannot lay off or get rid of all of the staff we have hired and trained.

Expedite the contract and finalize the contract without the continuous modifications.

Document:	Attached?
Ramp Up Schedule	Yes
Field Staff Training Logs for Agency Staff & Subcontractors	Yes
Diagnostic Equipment Log	Yes
Disclosure of Findings	Yes
Disclosure of Legal Proceedings	Yes

Enter any comments you wish to make relative to the Local Plan and ARRA.

DOE ARRA PRIORITY PLAN NARRATIVE

Outreach

Describe in narrative format the selection process for dwellings to be weatherized and the outreach methods to be utilized to assure that eligible households are made aware of the services through DOE ARRA or any similar energy-related assistance program.

Selection Process: Households with the highest energy burden and/or households with elderly, disabled or family members under the age of 5, will be weatherized first. In addition, those households whose home is in dyer need of weatherization services, example: broken windows, non-functioning water heater or wall heaters, non-functioning stove, etc., will also be given a high priority.

We will be contacting our local news media, plus radio & newspapers to inform the community of the availability of ARRA Weatherization dollars to weatherize for free the homes of the low to moderate income homeowners and renters. We will use our LIHEAP energy assistance workshops to inform the eligible households of the ARRA Weatherization program also. Fliers will be distributed throughout the community and in our local Department of Health & Human Services, Employment Development Department and Social Security Administration buildings.

Reweatherization

Describe in narrative format your selection process to ensure compliance with the DOE ARRA Reweatherization Policy when providing services to dwellings previously weatherized from September 30, 1994 and earlier.

We will take into account our previously weatherized homes and recertify any households requesting additional weatherization services. Keeping in mind the 4 priority measures needed per home. In the instance that we receive many requests, the above mentioned priority plan would be implemented.

Client Education

Describe in narrative format a description of how your client education services will be provided to include needs assessments, budget education/counseling, energy conservation and weatherization measures education. Describe how your activities are designed to target households that have not been previously serviced under a LIHEAP or DOE Weatherization program.

Our assessor, at the time of certification, goes over the clients budget form and counsels him on his spending habits. In addition, the assessor goes over all of the weatherization measures with the client and informs him of the savings they shall receive. The assessor then goes over our energy conservation information flyer with the client and has them sign the carbon copy form. The original is given to the client and the carbon copy stays in each file for proof of receipt.

We always target homes who have not been previously weatherized. In the intent that a home needs additional weatherization measures, the household would have to wait a minimum of 4 years to be considered under our existing LIHEAP Contract..

**Training and
Technical
Assistance**

Describe in narrative format a description of how you will provide Training and Technical Assistance to your administrative and program staff.

The experienced Administrative Staff have receive their training and answers to any upcoming problems through CSD. Accounting staff attended training on certified payroll in order to comply with the Davis Bacon Act regulations. All weatherization crews attended all of the required trainings, as per the ARRA Contract, and have been working with our experienced LIHEAP/DOE weatherization installers as hands on training in the actual work of weatherization.

Leveraging

Describe in narrative format how you will leverage DOE ARRA funds with other available program funds and how much leveraging you plan on coordinating.

MAAC Project does not intend to leverage DOE ARRA funds with any of our existing contracts.

RAMP UP SCHEDULE

	2009			2010			2011		
	1	2	3	4	5	6	7	8	9
	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Total Expenditures by County	10	10							
Crew Members	10								
Other -	0								
Total	13	13	0	0	0	0	0	0	0
Job Creation - Subcontractors	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Basic Weatherization	0								
Specialty	0								
Other -	0								
Other -	0								
Total	0	0	0	0	0	0	0	0	0
Vehicle & Equipment Purchases	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Total	0.06	0.06	0	0	0	0	0	0	0
Vehicles	0.06	6%							
Equipment -	0								
Equipment -	0								
Equipment -	0								
Equipment -	0								
Total	0.06	0.06	0	0	0	0	0	0	0

Instructions

Expenditures by County -

- Enter the name of each county in your service territory on separate lines.
- For each county, enter the percentage of funds you plan to expend by the end of each quarter.

Unit Production By County -

- Enter the name of each county in your service territory on separate lines.
- For each county, enter the number of units you plan to complete by the end of each quarter.

Job Creations - Agency -

- Enter the number of employees by category that you estimate will be hired each quarter.

- Categories - If a new hire fits into more than one category, count the person only once. Place them in the category that requires the most training per the proposed training coursework in the instructions.

Job Creations - Subcontractors

- Enter the estimated number of jobs that will be created by contracting with subcontractors for both basic wx and specialty work.
- To help determine the number of jobs, base your estimate as if you were doing a direct hire rather than subcontracting.

Vehicle & Equipment Purchases over \$5,000 per Unit

RAMP UP SCHEDULE

Agency:

Total Expenditures by County	2009									2010									2011								
	1	2	3	4	5	6	7	8	9	1	2	3	4	5	6	7	8	9	1	2	3	4	5	6	7	8	9
	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31

- Enter the quantity of vehicles and equipment in the quarter you are planning to make the purchases even if only a portion of the purchase will be charged to ARRA.

Note: Although this sheet is protected, there is no password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

FIELD STAFF TRAINING LOG

Subcontractor Name:

Agency Name:

Employee Name	Hire Date	Basic Wx	CAS	Blower Door	Duct Blaster	Environ Hazard	Lead-Safe Wx	HUD Lead-Safe Wx	Performs Unit Assessments?
Field Supervision									
Terrell James	08/17/09	08/31/09 CAP san	08/17/09 CAP	09/14/09 CAP	09/14/09 CAP	10/05/09 on line	10/01/09 on line		
Assessors / Inspectors									
Saul Valdez	09/08/09	10/30/09 CAP san	09/21/09 CAP	10/05/09 CAP	10/05/09 CAP	on line	online		X

Training Date

Provider

Training Date

Provider

Assessors / Inspectors

Training Date

Provider

Training Date

Provider

Training Date

Provider

Training Date

Provider

Crew Leaders (Journeyman)

Training Date

Provider

Training Date

Provider

Training Date

Provider

Training Date

Provider

Training Date

Provider

Training Date

Provider

Empl. Hire Date Basic Wx CAS Blower Door Duct Blaster Environ Lead-Safe Wx HUD Lead-Safe Wx Performs Unit Assessments?

Crew Members (Apprentices)

Dlovon Banani	08/17/09	Training Date	08/31/09	SB	10/05/09	10/05/09	10/05/09	09/22/09	on line	09/22/09	on line	09/22/09	on line	09/23/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line
Armando Corrales	08/17/09	Training Date	08/31/09	SB	10/05/09	10/05/09	10/05/09	09/22/09	on line	09/22/09	on line	09/22/09	on line	09/23/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line
Ramon Lugo	08/17/09	Training Date	08/31/09	SB	09/14/09	09/14/09	09/14/09	09/23/09	on line	09/23/09	on line	09/23/09	on line	09/23/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line
Anthony Sanchez	09/28/09	Training Date	10/30/09	SB	10/05/09	10/05/09	10/05/09	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line
Francis Tuedt	08/31/09	Training Date	08/31/09	SB	10/05/09	10/05/09	10/05/09	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line
Navin Samaroon	08/31/09	Training Date	08/31/09	SB	10/05/09	10/05/09	10/05/09	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line
William Bilbo	10/26/09	Training Date	08/31/09	SB	10/05/09	10/05/09	10/05/09	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/12/09	on line	10/01/09	on line	10/12/09	on line

Instructions

Complete this form for your agency and include all current weatherization and HCS employees who work on CSD programs.

Complete a separate form for each subcontractor who currently performs basic weatherization services for your agency. Do not complete a form for subcontractors who are CSD service providers.

Categorize employees by their primary job function. Count each part-time employee as one.

Provider key -

- Please use one of the following choices when entering a provider.

Use	For
STC	PG&E Energy Training Center in Stockton
SB	San Bernardino Energy Training Center
In-house	Provided at the agency by another agency employee
Onsite	Onsite training provided by RHA
Other	Any other type of provider not listed

Performs Unit Assessments? -

- Place an X by any employee who performs assessments you consider to be the primary assessment of the dwelling.

Employee Name	Hire Date	Basic Wx	CAS	Blower Door	Duct Blaster	Environ Hazard	Lead-Safe Wx	HUD Lead-Safe Wx	Performs Unit Assessments?
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Note: Add more lines when necessary. The form is protected without a password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

Subcontractor:

[illegible]

How many additional blower doors will you be purchasing for ARRA?						
Blower Make / Model Number / Color	Acquisition Date (or date updated whichever is later) of Duct Blaster (excluding gauge)	General Condition of Duct Blaster (excluding gauge)	Gauge Make / Model / Type	Acquisition Date of Gauge	General Condition of Gauge	Date Gauge Last Sent to Manufacturer?
Duct Blasters						
w/DG-700	07/07/09	new				N/A
w/DG-700	07/07/09	new				N/A
w/DG-700	07/07/09	new				N/A
w/DG-700	07/07/09	new				N/A
How many additional Duct Blasters will you be purchasing for ARRA?						

Instructions

Complete this form for your agency including all equipment you have whether or not you are currently using it in the field.

Complete a separate form for each subcontractor who performs basic weatherization services for your agency. This does not include subcontractors who are CSD service providers.

Acquisition Dates -

- If you do not have the acquisition date, please provide an approximate year that you purchased the equipment.

CO Analyzers -

- Last Calibration by Whom? - If the equipment was calibrated by an employee in-house using a kit, enter "In-House". If it was sent out to the manufacturer for calibration, enter "Manuf".

- Date Last Sent to Manufacturer - Enter the date that the equipment was last sent to the manufacturer for calibration, repair or any other reason. If you have not sent the equipment to the manufacturer since you acquired it, enter "N/A".

Blower Doors & Duct Blasters -

- Date Gauge Last Sent to Manufacturer? - Enter the date that the gauge was last sent to the manufacturer for any reason. If you have not sent the equipment to the manufacturer since you acquired it, enter "N/A".

Future Purchases -

- Be certain to answer this question after each type of equipment. This will help CSD in negotiating some bulk purchase rates.

Note: Add more lines when necessary. The form is protected without a password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.